MANAGING CHANGES IN A
RELATIONSHIP MANAGEMENT SYSTEM

Abstract

A relationship management system stores multiple versions of contact information for a particular contact by storing the contact information that is available to all of the users of system that know a particular contact in a firm collection and by storing information about the particular contact that is available to a limited number of users that know the particular contact in one or more user collections. When changes are made to the firm collection for a particular contact, which can occur automatically when any user changes the contact file for that contact within his or her user collection, the change is reflected back to each of the users a having contact file for that contact within their user collection. The same change may be automatically made to each of the contact files within the user collections or may be reported to the users and allow the users to accept or reject the same change to the user collections owned by those users. Preferably, each user can control or specify, on a contact by contact basis, how a change to the firm collection for a contact effects or is reflected within the contact file for that contact within that user's user collection.